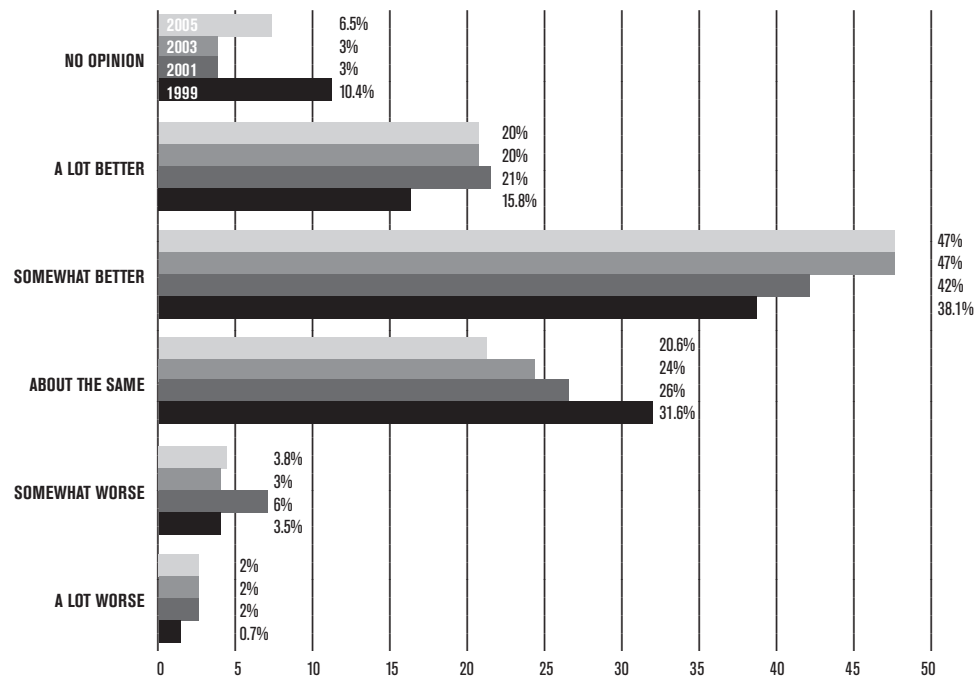


The Status of Downtown "Right Now"

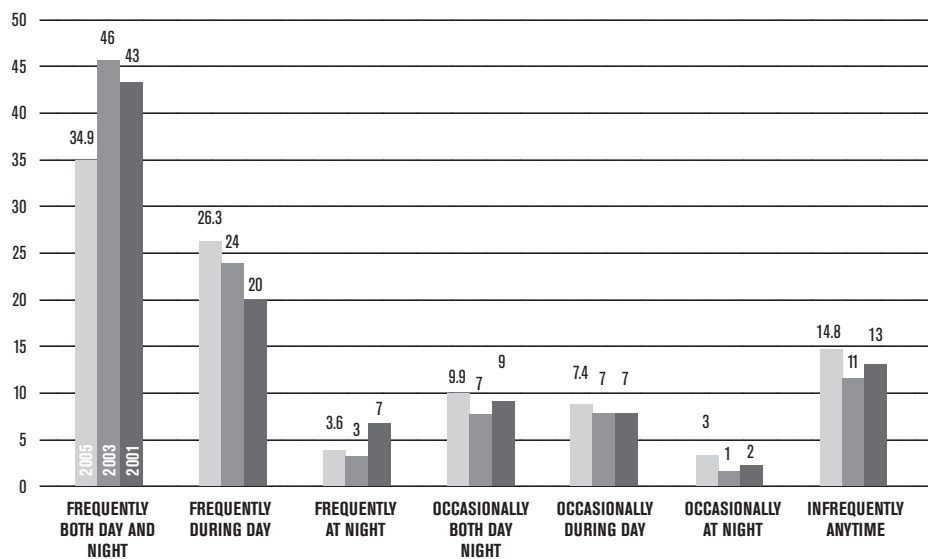
- The majority of all respondents characterize downtown as "getting better," up from 54% in 1999 to 67% this year – the same percent as in 2003.
- The proportion of "no change" has declined for the fourth consecutive time to a low of 21%.
- Ratings of "worse" constitute a small proportion of the total and are not statistically different in 2005 than in past years. The same can be said for those holding "no opinion."

Rate Your Opinion of the Status of Downtown Right Now



Frequency of Visiting Downtown Anytime

(in percent of all respondents)



Overall Image of Downtown

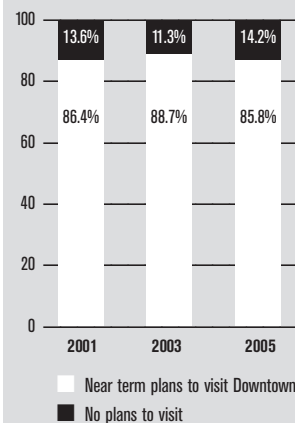
POSITIVE

- Favorable Geography
- Noteworthy Architecture
- Variety of Things to Do

NEGATIVE

- Construction
- Traffic Congestion
- Street People
- Focus on Crime in the News

Plans to Visit in the Near Term



Visits to Downtown

- 35% of all respondents regularly visit Downtown both day and night.
- Almost nine in ten (86%) of all respondents plan to visit downtown Milwaukee within the next three months.
- 26% have visited at night in the last 11 months.
- 2005 saw a statistically significant difference in the proportions who indicated plans to visit during the summer of 2005 across counties with Waukesha and Milwaukee most often indicating plans (91% of Waukesha residents and 90% of Milwaukee respondents) compared with 78% of Ozaukee respondents, 74% of Washington respondents and 73% of Kenosha/Racine respondents.

Status of the Downtown Milwaukee Brand in Southeastern Wisconsin

Summary

■ The downtown Milwaukee brand is strongly planted in the minds of nearly all those who live in southeastern Wisconsin.

■ Although the extent to which residents differentiate downtown from other parts of the City of Milwaukee is uncertain, particularly when they use the media to form a mental map of crime and safety areas, area residents are familiar with the geographic boundaries when they are specifically asked about them. Free and paid publicity sponsored by BID #21 and others has clearly had a positive effect on awareness of what downtown has to offer.

"Downtown Milwaukee is user-friendly, not a huge city, not hard to get around, safe and fairly open."

■ Area residents know and participate in many of the activities offered, particularly festivals, the arts and dining establishments, and find the area aesthetically pleasing both in terms of natural and built environment.

■ They offer more comments related to "bests" than "worsts" when asked to use their own words to describe these two conditions. Most believe that things are getting better downtown.

■ Special analyses show that the festivals including Jazz in the Park weigh in as the most favorable aspect of downtown, followed by nightlife and restaurants.

■ The same analysis for the most unfavorable aspects of downtown reveal perceived crime and crowds as the most salient factor, followed by traffic and construction.

■ As the major reconstruction to the Marquette Interchange is to continue for a few years, it is likely that there will be an opportunity for those visiting downtown to become more familiar with alternative routes and to habituate to the congestion as part of the routine.

"It looks much better and I am dying to get down and see the new museum. Downtown looks so much better with the Midwest Airlines Center. It is cleaner and just looks better."

It will be important to facilitate that familiarity in the construction years ahead and to help people mentally frame the construction favorably. Some respondents indicate that they see the construction as positive growth and metamorphosis. This perception can be fostered.

■ Although crime is low in downtown Milwaukee, the perception of unsafe conditions at night also prevails. It is important that all downtown entities continue to actively partner with law enforcement and neighborhood organizations throughout the City of Milwaukee in supporting and publicizing crime reduction programs.

■ Many of the factors which some regard as the positives about downtown Milwaukee are regarded by others as negatives. Some describe the area as clean, filled with fine architecture and friendly people. Others describe the area as smelly, run-down and filled with vagrants. From a brand perspective, this suggests that the same realities are being differentially perceived. While such variable perceptions are inevitable, this variability does suggest the opportunity for re-branding aspects of downtown and creating a more favorable image among area residents. The perception of construction as a sign of positive growth and growing sophistication is an example.

"Just the excitement of being a really fun city. I think it has a lot to offer. Good universities, great academia, great bars, nice people, and lots of festivals..."



Methodology

- Telephone survey of households in the six-county region
- 500 adults between the ages of 18-65 participated
- Random sample throughout the region
- Percentage of participating households in each county were directly proportional to the population of that region
- Conducted bi-annually since 1999
- Margin of error is 4.4%

Survey by County

- 50% - Milwaukee County
- 20% - Waukesha County
- 11% - Racine/Kenosha Counties
- 10% - Ozaukee County
- 9% - Washington County

Respondent Demographics

GENDER

- 44% Male
- 56% Female

RACE

- 83% White
- 10% Black/African American
- 7% Other Races

AGE

- 13% Under Age 30
- 20% 30 - 39
- 25% 40 - 49
- 42% 50 or Older

CHILDREN

- 43% No Children Under Age 18 in Household
- 22% One Child Under Age 18 in Household
- 35% Two Children Under Age 18 in Household

STATUS

- 61% Married

EDUCATION

- 40% College Graduate

HOUSEHOLD INCOME

- 22% Under \$35,000
- 14% \$35 - \$49,999
- 20% \$50 - \$74,999
- 29% \$75,000 or More
- 15% Refused

EMPLOYMENT

- 70% Employed Outside Home



Branding

Study results support key aspects of any brand including:

AWARENESS -

The ability of residents in southeastern Wisconsin to identify the area that constitutes downtown Milwaukee.

ATTRIBUTES -

The descriptive features that characterize downtown, its personality and heritage.

BENEFITS -

The value and meaning that residents attach to those attributes.

IMAGES, FEELINGS & ATTITUDES -

Visual images that come to mind when asked to describe downtown Milwaukee.

EXPERIENCES -

What they have actually done in downtown Milwaukee both recently and in the more distant past.

Milwaukee Downtown's Mission

The BID's mission to "assure a clean and friendly environment and promote downtown Milwaukee as the gathering place to live, learn, work, eat and play" is supported by promotional activities that establish a downtown Milwaukee brand that sets it apart from other communities in the region.

Brands are much more than a logo; they are the culmination of everything that plants an image in the mind.

The downtown Milwaukee brand is impacted by the same range of factors that affect any brand:

- The direct experiences people have.
- What they hear from acquaintances, family or the media.
- The perception of the area that people bring from their past.

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Summary

The bi-annual survey results clearly show that the efforts of BID #21 and others to promote the benefits of downtown Milwaukee as a place to live, work and play are having an effect. This year's study shows:

- Awareness levels of what people in the six-county area constitute as the downtown area are comparable to 2003 with 38.3% of respondents saying they "know exactly" the boundaries that make up downtown Milwaukee. Only 6.6% reported absolutely no familiarity.
- Residents in Kenosha, Racine and Washington counties are less sure about what constitutes downtown Milwaukee and are less likely to visit, work or play.
- Over two-thirds say that, overall, downtown is "getting better."

Attributes that Southeastern Wisconsin Residents Ascribe to Downtown

- Feelings of safety during the day
- Cleanliness and attractiveness
- Friendliness of the people

Safety

Feelings of safety during the day and at night have improved significantly since 1999.

DURING THE DAY:

61% in 1999 - 69% in 2005, up from 66% in 2003

AT NIGHT:

38% in 1999 - 43% at night, equivalent to 2003

Respondents between the ages of 30 and 64 indicated the most positive feelings of safety with the youngest and oldest groups reporting relatively lower levels.

Awareness of Public Service Ambassadors increases feelings of safety.

Safety Continues to be a Concern

Crime and safety issues were the third most frequently mentioned negative aspect of downtown.

- People who bring up crime and safety issues in top-of-mind "worst" comments are significantly more likely to say they have negative feelings about visiting downtown at night, but not about daytime visits.
- Feelings of safety both during the day and at night have improved some since 1999, although appear to have leveled off recently.

Clean, Attractive and Friendly

Cleanliness is a hallmark of downtown and has consistently been in the top three attributes that influence people to come downtown. This year, cleanliness scored highest of all attributes in influencing visits downtown.

Factor analysis shows safety, cleanliness, attractiveness and friendliness are all related in the minds of respondents.

Traffic and Parking

The perception of parking problems, traffic and congestion continue to persist and are likely exacerbated by the recent work on the Marquette Interchange.

- Parking, traffic and congestion topped the list of "worst things" about downtown.
- Cost of parking remains an equally strong or very strong influence, with about one-third of all respondents giving it mention.
- Nearly half of all those surveyed (47%) indicated that the availability of public transportation to stores and attractions served as a strong or very strong influence on their visit.
- The "expectation of traffic and congestion" also remains a strong or very strong influence in the decision to visit downtown for nearly half (45%) of all respondents. Overall, the percentages reporting traffic congestion as a salient factor in their visits has hovered at or around an average of 44% since 1999.

Marquette Interchange Project

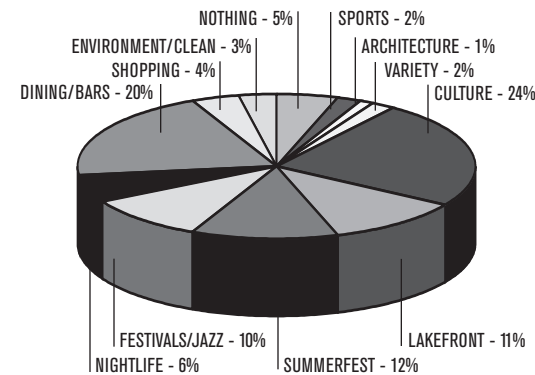
- No explicit question.
- Added code for Interchange based on relatively high number of open-ended mentions.
- The "expectation of traffic and congestion" was explicitly identified and found to exert a strong/very strong influence on visits for 45% of respondents.
- 8% of all respondents could not think of a "worst" aspect of downtown. This is a sharp decline from 23% in 2003 and may be attributable in part to the highway construction, which was added as a new category to the survey this year to accommodate the reconstruction of the Marquette Interchange.
- Regression analysis did not show traffic and congestion as a factor affecting willingness to visit or affecting the reported frequency of visits - although, the effect of the Marquette Interchange Project could not be explicitly tested here.

Benefits

Downtown Milwaukee is a regional Mecca for:

- Performing Arts
- Cultural Attractions
- Festivals
- Restaurants

Only five percent of respondents had nothing come to mind when asked about "top best things" about downtown. Clearly, downtown has an image that includes favorable aspects for nearly all.



Performing Arts Continue to be a Draw

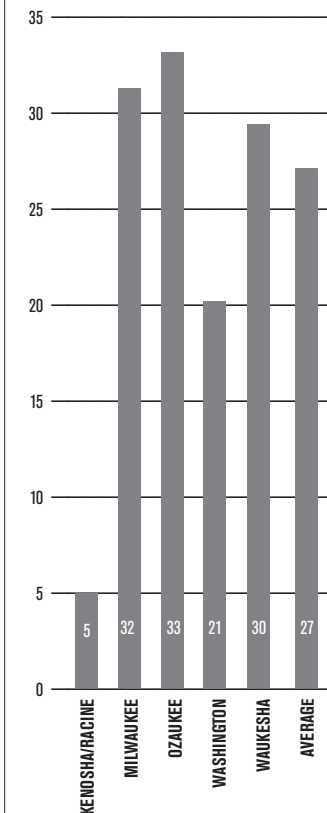
The performing arts have consistently been the top rated activity throughout all counties in all survey years.

As in 2003, nine of ten respondents rate the performing arts downtown as "good" to "excellent." Also strong are restaurants for dinner, special events/festivals, historical attractions and museums.

Holiday Participation

Attendance/Participation in One or More Events Downtown During the Past Holiday Season

Events Specified - The Jingle Bus, The Milwaukee Holiday Parade, New Year's Eve Celebration, Christmas in the Ward (in percent of all respondents)



Milwaukee Holiday Lights Festival

High awareness of:

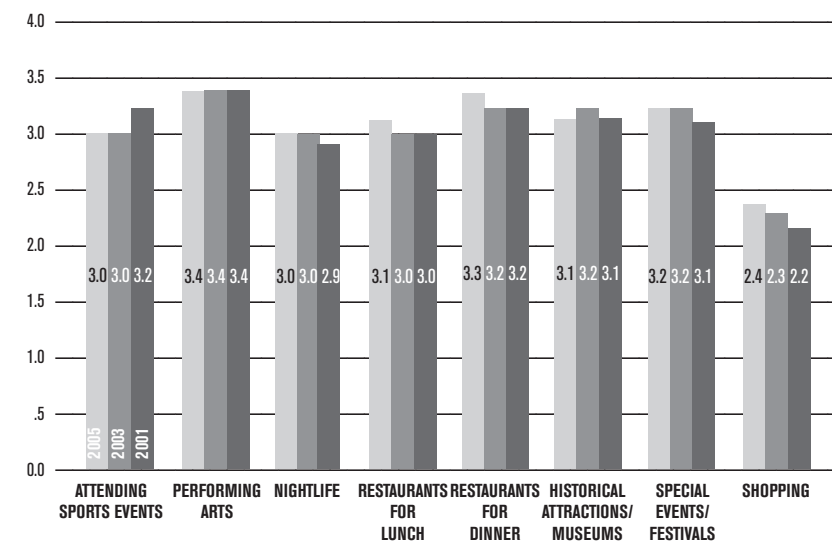
- The Milwaukee Holiday Parade (68%).
- The Jingle Bus (40%).
- 36% reported attending a holiday performance.
- The number one draw for respondents to visit downtown during the holidays was culture/entertainment (18.3%), followed by shopping (17.8%).

Shopping and Retail Continue to be Weak

- 30% of respondents say that they "never" shop downtown.
- 51% say that they do so "less than once a month."
- No improvement in either the perception of good shopping or the incidence of reported shopping downtown in the four survey years was shown.

Rating of Downtown on Selected Activities

(Rating on Excellent, Good, Fair, Poor Scale - 4 = Excellent)



2005 Reasons for Visiting Downtown

